

No  
Staples

## 2011 Montana Individual Income Tax Return

Form 2

For the year Jan 1 – Dec 31, 2011 or the tax year beginning

MMDD 2011

and ending

MMDD 20YY

☒ Mark all  
that apply.☐ Amended  
Return☐ NOL  
Carryback

First Name and Initial	Last Name	Social Security Number	Deceased? Date of Death
Spouse's First Name and Initial	Last Name	Spouse's Social Security Number	Deceased? Date of Death
Mailing Address	City	State	Zip+4

## Filing Status

☒ Mark only  
one box.

- 1 Single  
2 Married filing jointly  
3a Married filing separately on the same form  
3b Married filing separately on separate forms  
3c Married filing separately and spouse not filing  
4 Head of household

Spouse's SSN

Residency  
Status☒ Mark only  
one box.

- 5a Resident full year  
5b Nonresident full year  
5c Resident part-year

## Resident Part-Year Required Information

Date of change ▶ MMDDYY

State moved to ▶ State moved from ▶



## Did you know?

You can e-file this form.  
[revenue.mt.gov/efile](http://revenue.mt.gov/efile)

First Name	Last Name	Social Security Number	Relationship	Disabled
				◀ Yes
				◀ Yes
				◀ Yes
				◀ Yes

## Exemptions

- 6a ☒ Yourself ◀ 65 or older ◀ Blind Enter number marked ▶  
6b ◀ Spouse ◀ 65 or older ◀ Blind Enter number marked ▶  
6c Enter the total number of dependents. If more than 4 dependents, see instructions on page 3. ▶  
6d Add lines 6a through 6c and enter total exemptions here. ▶

Column A (for single,  
joint, separate, or head  
of household)Column B (for spouse  
when filing separately  
using filing status 3a)

Enter amounts on lines 7 through 38 corresponding to your federal return. Round to nearest dollar. If no entry, leave blank.

Federal Income	7	8a	8b	9	10	11	12	13	14	15a	15b	16a	16b	17	18	19	20a	20b	21	22
Wages, salaries, tips, etc. Include federal Form(s) W-2.	00	00		00	00		00	00	00	00	00	00	00	00	00	00	00	00	00	
Taxable interest. Include federal Schedule B if required.		00																		
Tax-exempt interest. Do not include on line 8a. ▶			00																	
Ordinary dividends. Include federal Schedule B if required.				00	00															
Taxable refunds, credits, or offsets of state and local income taxes.				00	00															
Alimony received.				00	00															
Business income or (loss). Include federal Schedule C or C-EZ. NAICS: ▶				00	00															
Capital gain or (loss). Include federal Schedule D if required.				00	00															
Other gains or (losses). Include federal Schedule 4797.				00	00															
IRA distributions. ▶	15a	00	00							15a	00	00								
Pensions and annuities. ▶	16a	00	00							16a	00	00								
Rental real estate, royalties, partnerships, S corporations, trusts. Include federal Schedule E.				00	00															
Farm income or (loss). Include federal Schedule F.				00	00															
Unemployment compensation.				00	00															
Social security benefits. ▶	20a	00	00							20a	00	00								
Other income; list type. ▶																				
Add the amounts in columns A and B for lines 7 thru 21.																				

This is your to



\*11CE0188\*

REVENUE & TRANSPORTATION INTERIM COMMITTEE  
DECEMBER 8-9, 2011  
December 8, Exhibit 3

## Tax, Nonrefundable Credits and Recapture

**This is your 2011 tax liability. ►**

53 00 00

**Questions?** Call us toll free at (866) 859-2254 or in Helena at 444-6900 or TDD (406) 444-2830 for hearing impaired.



\*11CE0288\*

Column A (for single, joint, separate, or head of household)	Column B (for spouse when filing separately using filing status 3a)
54	00
55	00
56	00
57	00
58	00
59	00
60	00
61	00
62	00
63	00
64	00
65	00
66	00
67	00
68	00
69	00
70	00
71	00
72	00
73	00
74	00

## Payments and Refundable Credits

- 54 Your 2011 tax liability from line 53. ▶
- 55 Montana income tax withheld. Include federal Form(s) W-2 and 1099. ▶
- 56 Montana mineral royalty tax withheld. Include federal Form(s) 1099 and supporting schedule, if any. ▶
- 57 Montana pass through entity withholding. Include Montana Schedule K-1 or Form PT-WH. ▶
- 58 2011 estimated tax payments and amount applied from your 2010 return. ▶
- 59 2011 extension payments from Form EXT-11. ▶
- 60 Refundable credits from Form 2, Schedule V, line 29. ▶
- 61 **If filing an amended return:** Payments made with original return. ▶
- 62 **If filing an amended return:** Previously issued refunds. ▶
- 63 Add lines 55 through 61. Subtract line 62, enter the result here. **This is your total payments.** ▶
- 64 If line 54 is greater than line 63, subtract line 63 from line 54. **This is your tax due.** ▶
- 65 If line 63 is greater than line 54, subtract line 54 from line 63. **This is your tax overpaid.** ▶

## Penalties, Interest and Contributions

- 66 Interest on underpayment of estimated taxes (see instructions on page 9). ▶
- If applicable, ☒ mark appropriate box: ☐ 2/3 farming gross income ☐ Estimated payments were made using the annualization method
- 67 Late file penalty, late payment penalty and interest (see instructions on page 10). ▶
- 68 Other penalties (see instructions on page 10). ▶
- 69 Total voluntary check-off contribution programs from lines 69a through 69d. ▶
- |   |     |      |    |                |
|---|-----|------|----|----------------|
| 69a Nongame Wildlife Program            | \$5 | \$10 | 00 | ◀ other amount |
| 69b Child Abuse Prevention              | \$5 | \$10 | 00 | ◀ other amount |
| 69c Agriculture in Schools              | \$5 | \$10 | 00 | ◀ other amount |
| 69d Montana Military Family Relief Fund | \$5 | \$10 | 00 | ◀ other amount |
- 70 Add lines 66 through 69 and enter the result. **This is the sum of your total penalties, interest and contributions.** ▶
- 71 If you have tax due (amount on line 64), add lines 64 and 70 OR, if you have a tax overpayment (amount on line 65) and it is less than line 70, subtract line 65 from line 70. Enter the result here. If married filing separately and there are amounts on lines 64 and 65, please see instructions on page 11. **This is the amount you owe.** ▶

**Why not e-pay? See your options at [revenue.mt.gov](http://revenue.mt.gov). If writing a check, make it payable to MONTANA DEPARTMENT OF REVENUE.**

## Amount You Owe or Your Refund

- 72 If you have a tax overpayment (amount on line 65) and it is greater than line 70, subtract line 70 from line 65 and enter the result here. **This is your overpayment.** ▶
- 73 Enter the amount from line 72 that you want applied to your 2012 estimated taxes. ▶
- 74 Subtract line 73 from line 72 and enter the result here. **This is your refund.** ▶

For Direct Deposit of your refund, complete 1, 2, 3, and 4 (please see instructions on page 12).

1. RTN#   2. ACCT#   

3. If using direct deposit, you are required to mark one box. ▶

☐ Checking☐ Savings

4. Is this refund going to an account that is located outside of the United States or its territories? ▶

☐ Yes☐ No

Under penalties of false swearing, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct and complete.

Your Signature is Required	Date	Daytime Telephone Number	Spouse's Signature	Date
Paid Preparer's Signature		Paid Preparer's PTIN/SSN		Firm's FEIN
Third Party Designee		Third Party Designee's Printed Name		
Do you want to allow your spouse and another person to discuss this return with us (see page 13)?		Third Party Designee's Phone Number		
<input type="checkbox"/> Yes <input type="checkbox"/> No		<input checked="" type="checkbox"/> Mark this box if you do not want forms and instructions mailed to you next year.		



**Schedule I - Montana Additions to Federal Adjusted Gross Income**

Enter your additions to federal adjusted gross income on the corresponding line.

**File Schedule I with your Montana Form 2.**

- 1 Interest and mutual fund dividends from state, county, or municipal bonds from other states. ▶
- 2 Dividends not included in federal adjusted gross income. ▶
- 3 Taxable federal refunds. Complete Worksheet II on page 44. ▶
- 4 Other recoveries of amounts deducted in earlier years that reduced Montana taxable income. Complete Worksheet IX (available at [revenue.mt.gov](http://revenue.mt.gov)). ▶
- 5 Addition to federal taxable social security benefits. Complete Worksheet VIII on page 48. ▶
- 6 Sole proprietor's allocation of compensation to spouse. ▶
- 7 Medical care savings account nonqualified withdrawals. ▶
- 8 First-time home buyer savings account nonqualified withdrawals. ▶
- 9 Farm and ranch risk management account taxable distributions. ▶
- 10 Addition for dependent care assistance credit adjustment. ▶
- 11 Addition for smaller federal estate and trust taxable distributions. ▶
- 12 Federal net operating loss carryover reported on Form 2, line 21. ▶
- 13 Share of federal income taxes paid by your S corporation. ▶
- 14 Title plant depreciation and amortization. ▶
- 15 Premiums for Insure Montana small business health insurance credit. ▶
- 16 Other additions. Specify: ▶  ▶
- 17 Add lines 1 through 16. Enter total here and on Form 2, line 39.

**This is your total Montana additions to federal adjusted gross income. ▶**Column A (for single,  
joint, separate, or head  
of household)Column B (for spouse  
when filing separately  
using filing status 3a)

1		00		00
2		00		00
3		00		00
4		00		00
5		00		00
6		00		00
7		00		00
8		00		00
9		00		00
10		00		00
11		00		00
12		00		00
13		00		00
14		00		00
15		00		00
16		00		00
17		00		00

**2011 Montana Individual Income Tax Table**

If Your Taxable Income Is More Than	But Not More Than	Multiply Your Taxable Income By	And Subtract	This Is Your Tax	If Your Taxable Income Is More Than	But Not More Than	Multiply Your Taxable Income By	And Subtract	This Is Your Tax
\$0	\$2,700	1% (0.010)	\$0		\$9,700	\$12,500	5% (0.050)	\$243	
\$2,700	\$4,700	2% (0.020)	\$27		\$12,500	\$16,000	6% (0.060)	\$368	
\$4,700	\$7,200	3% (0.030)	\$74		More Than \$16,000		6.9% (0.069)	\$512	
\$7,200	\$9,700	4% (0.040)	\$146						

For Example:

Taxable Income \$6,800 X 3% (0.030) = \$204

\$204 Minus \$74 = \$130 Tax



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